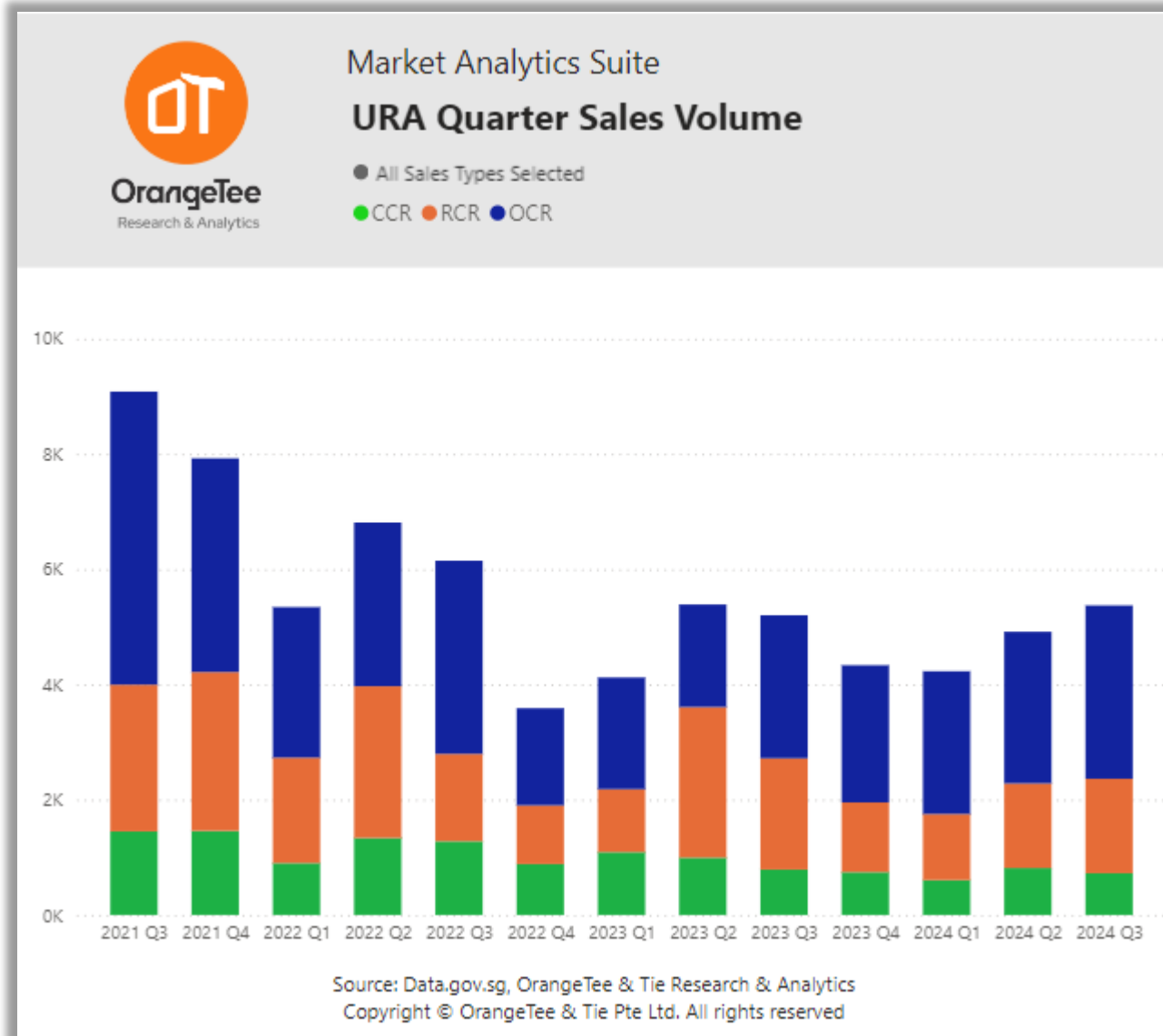




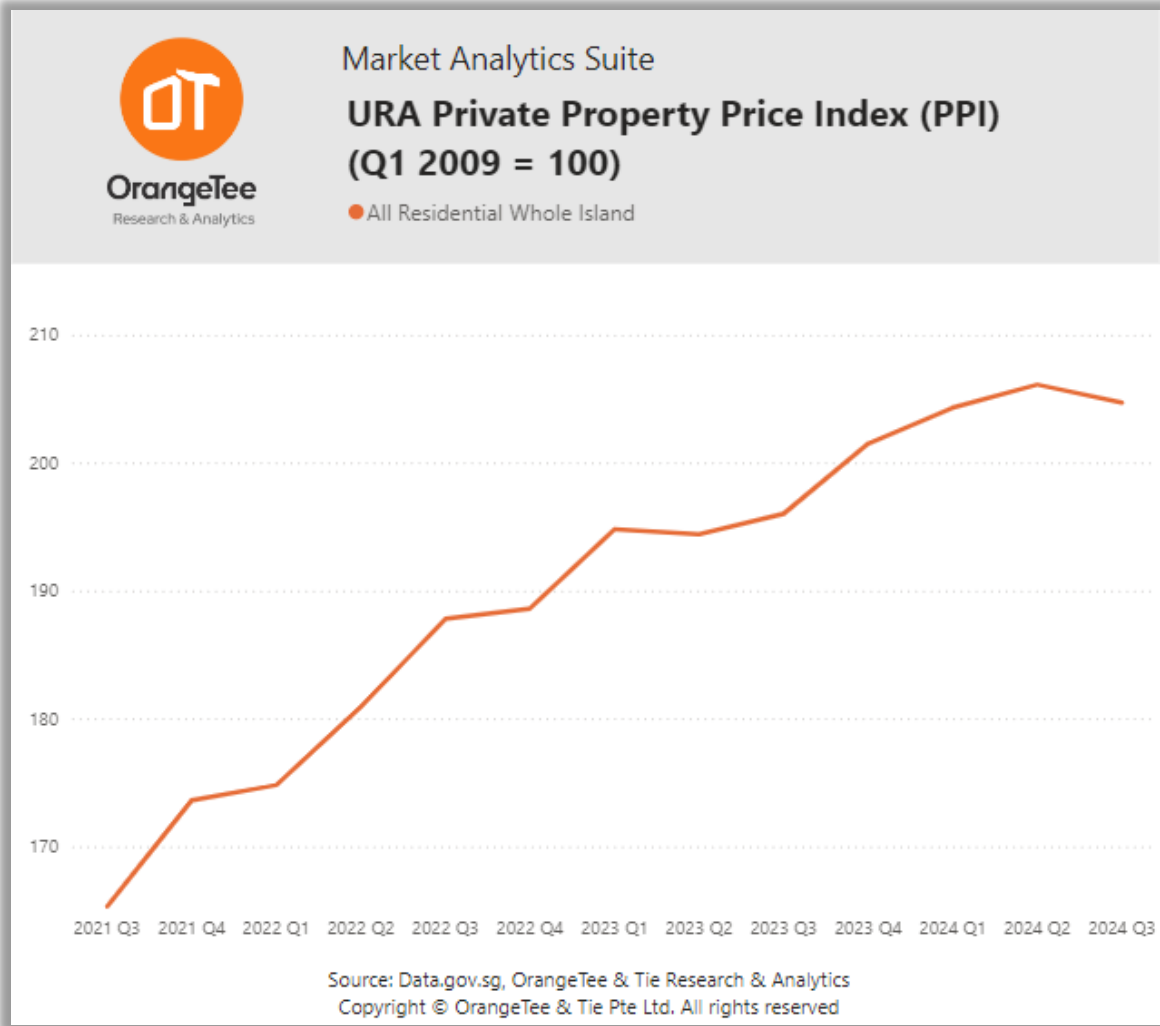
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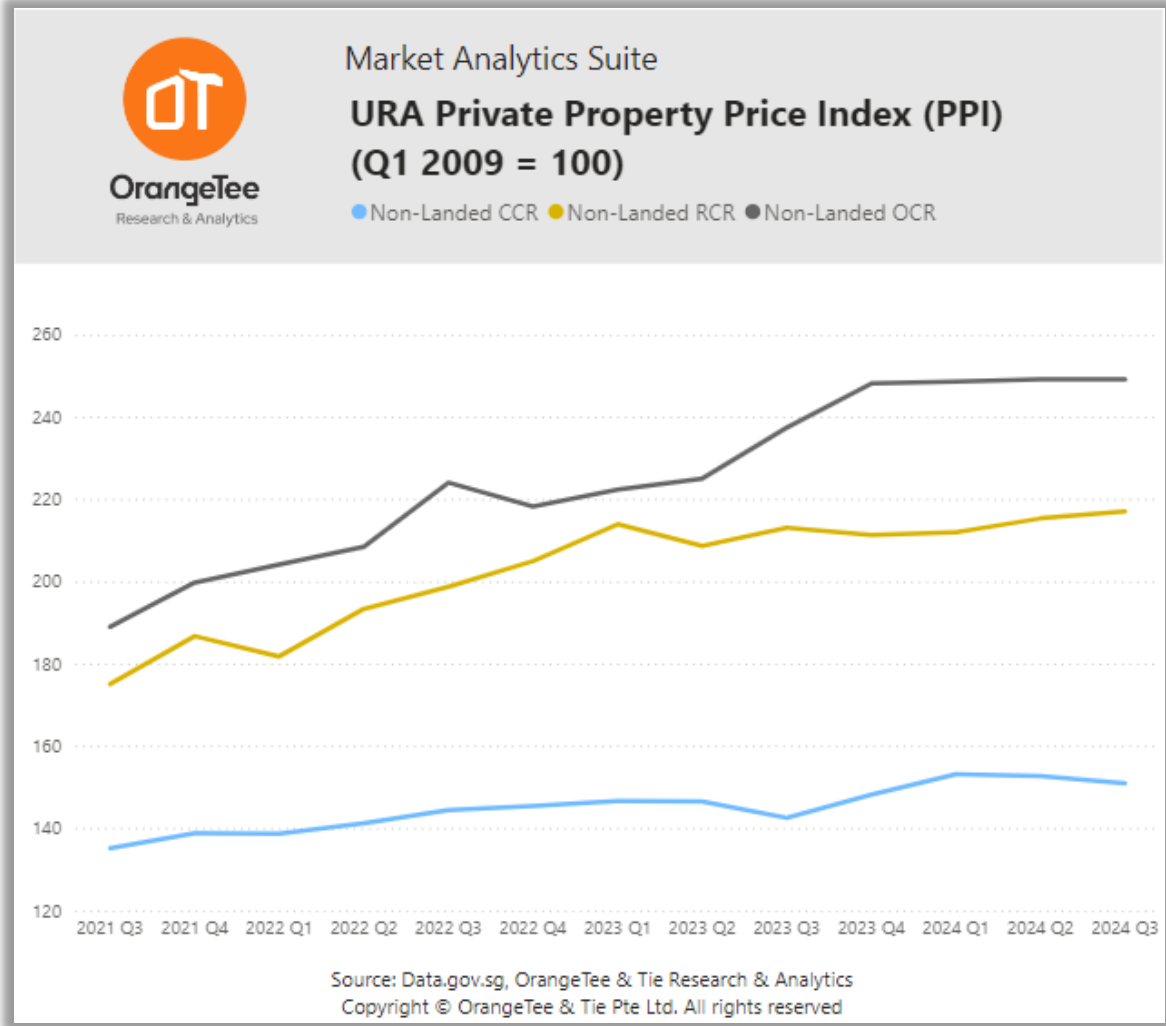
URA & HDB Q3 2024



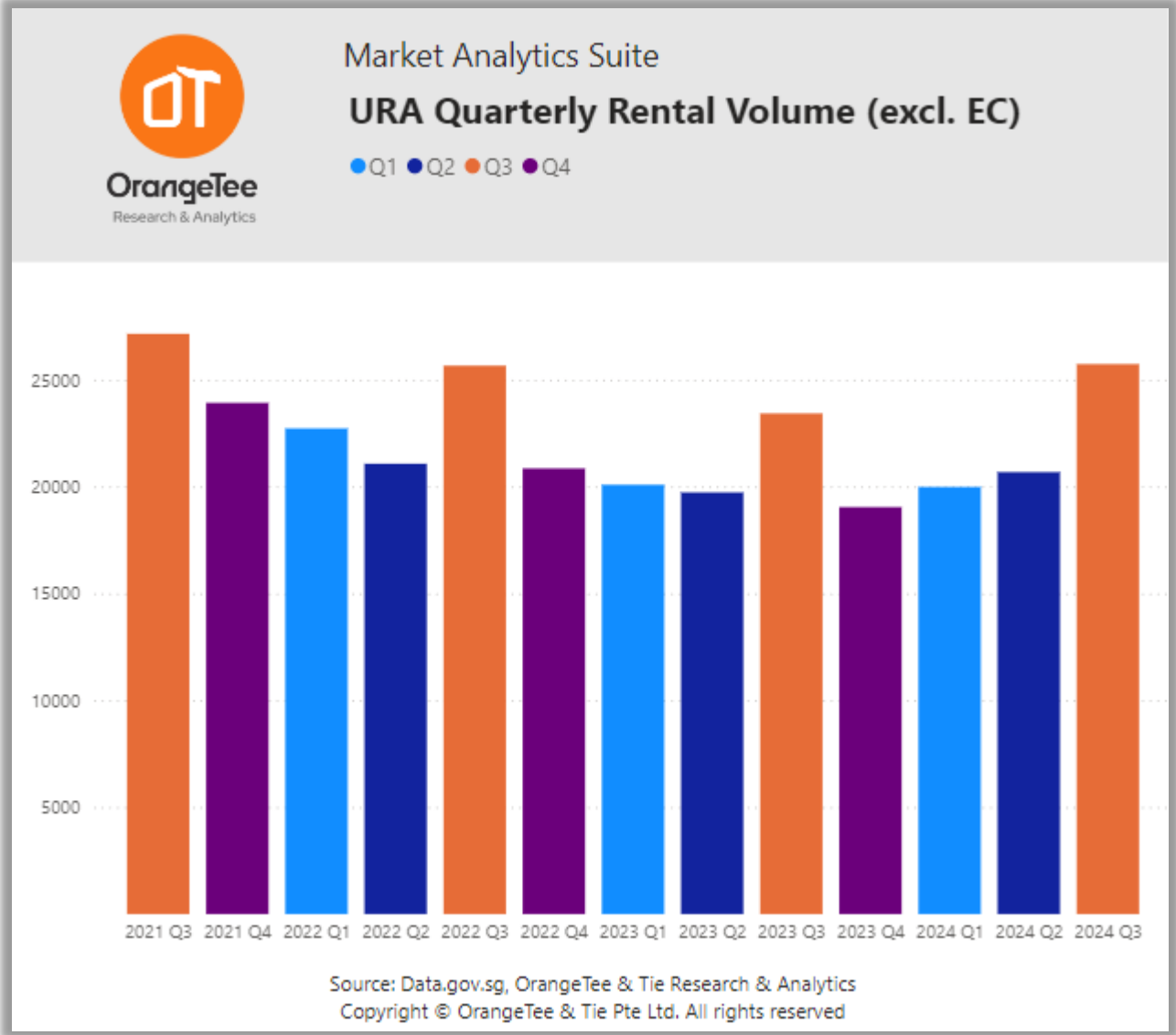
5,372 private homes excluding ECs were sold in Q3 2024, up 9.3% q-o-q



URA PPI fell marginally by 0.7% q-o-q



Prices of condos in CCR fell by 1.1% q-o-q; prices in RCR increased marginally by 0.8% q-o-q; prices in OCR remained unchanged



25,731 private homes excluding EC were leased in Q3 2024

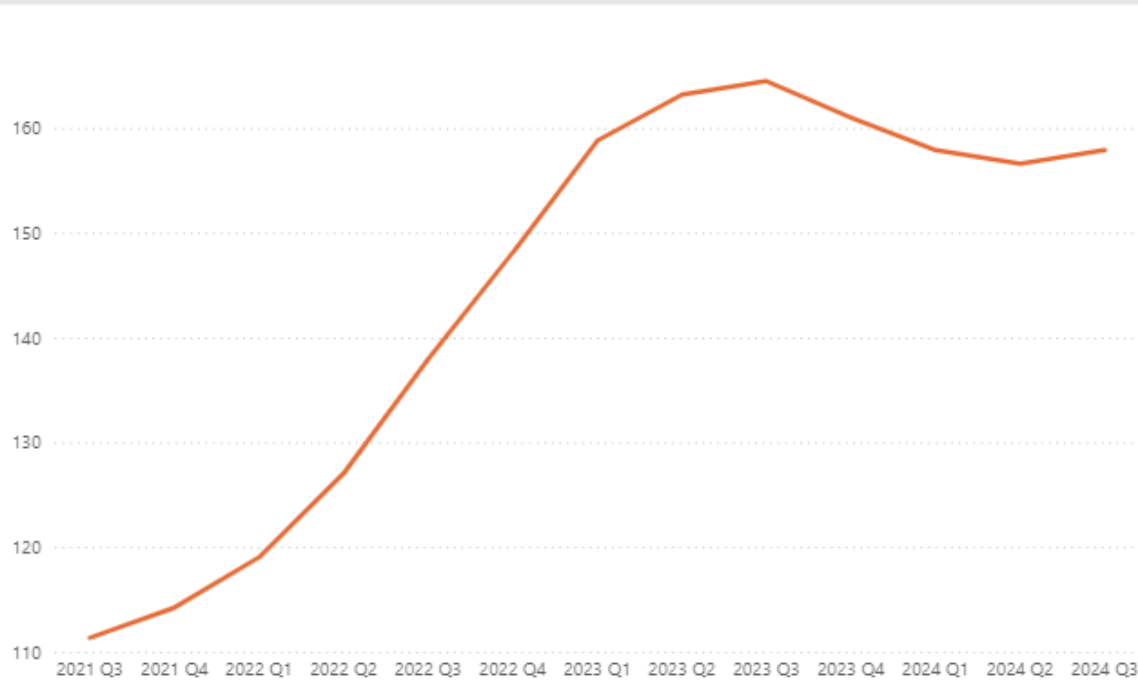


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URA Private Property Rental Index (Q1 2009 = 100)

● All Residential Whole Island



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Rental Index rose marginally by 0.8% q-o-q

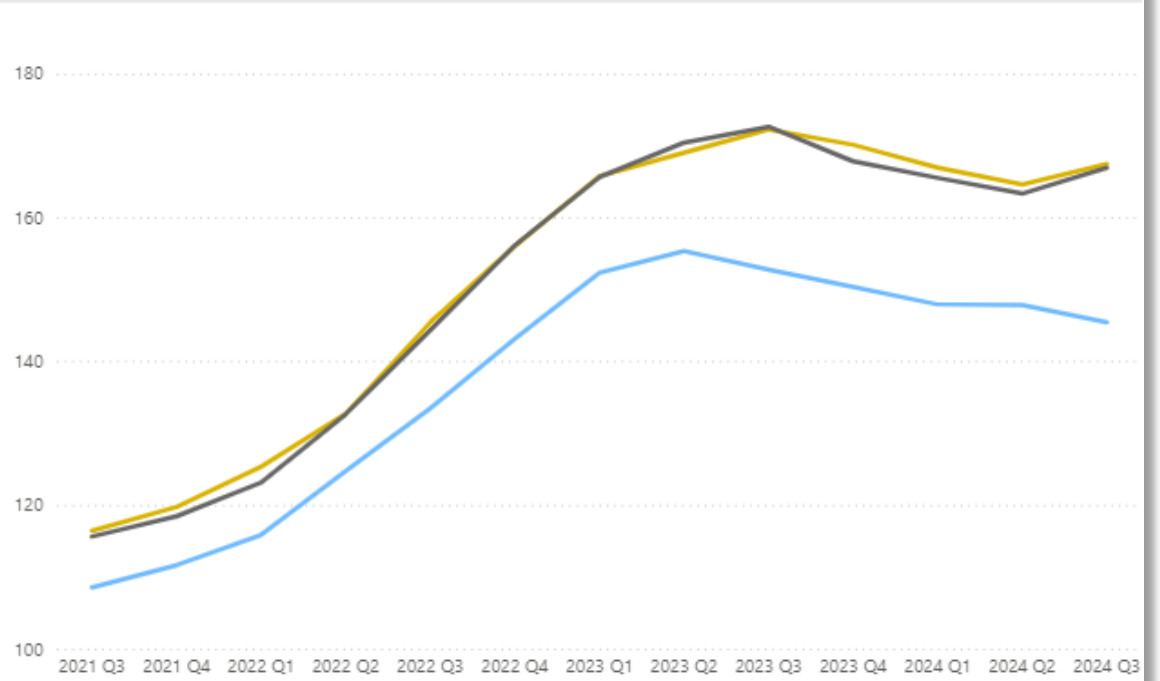


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URA Private Property Rental Index (Q1 2009 = 100)

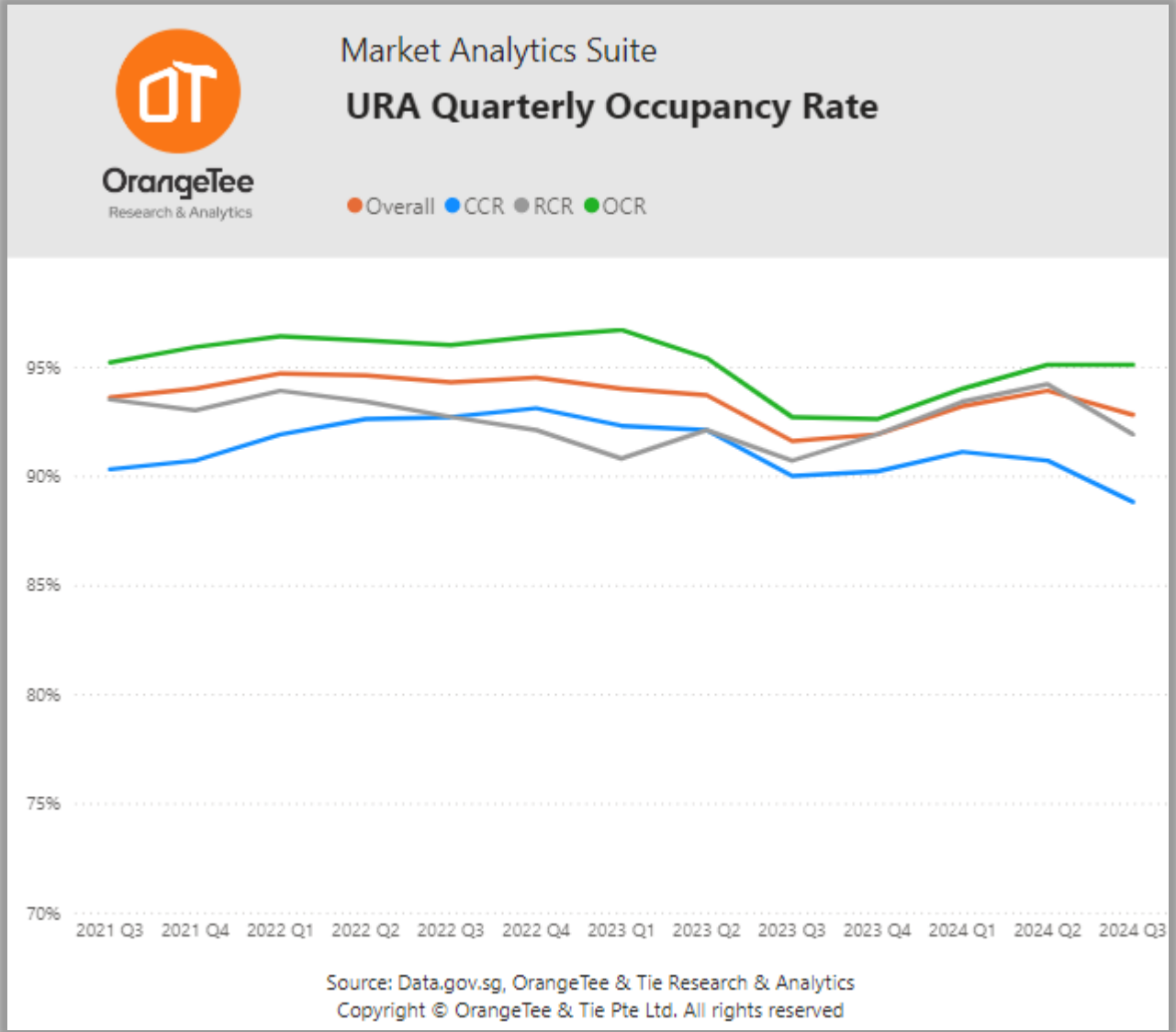
● Non-Landed CCR ● Non-Landed RCR ● Non-Landed OCR



Source: Data.gov.sg, OrangeTee & Tie Research & Analytics
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Rental of condos in CCR dipped by 1.6% q-o-q; rents in RCR and OCR increased by 1.7% and 2.2% q-o-q respectively

URA Rental Index



Overall occupancy decreased slightly to 92.8%

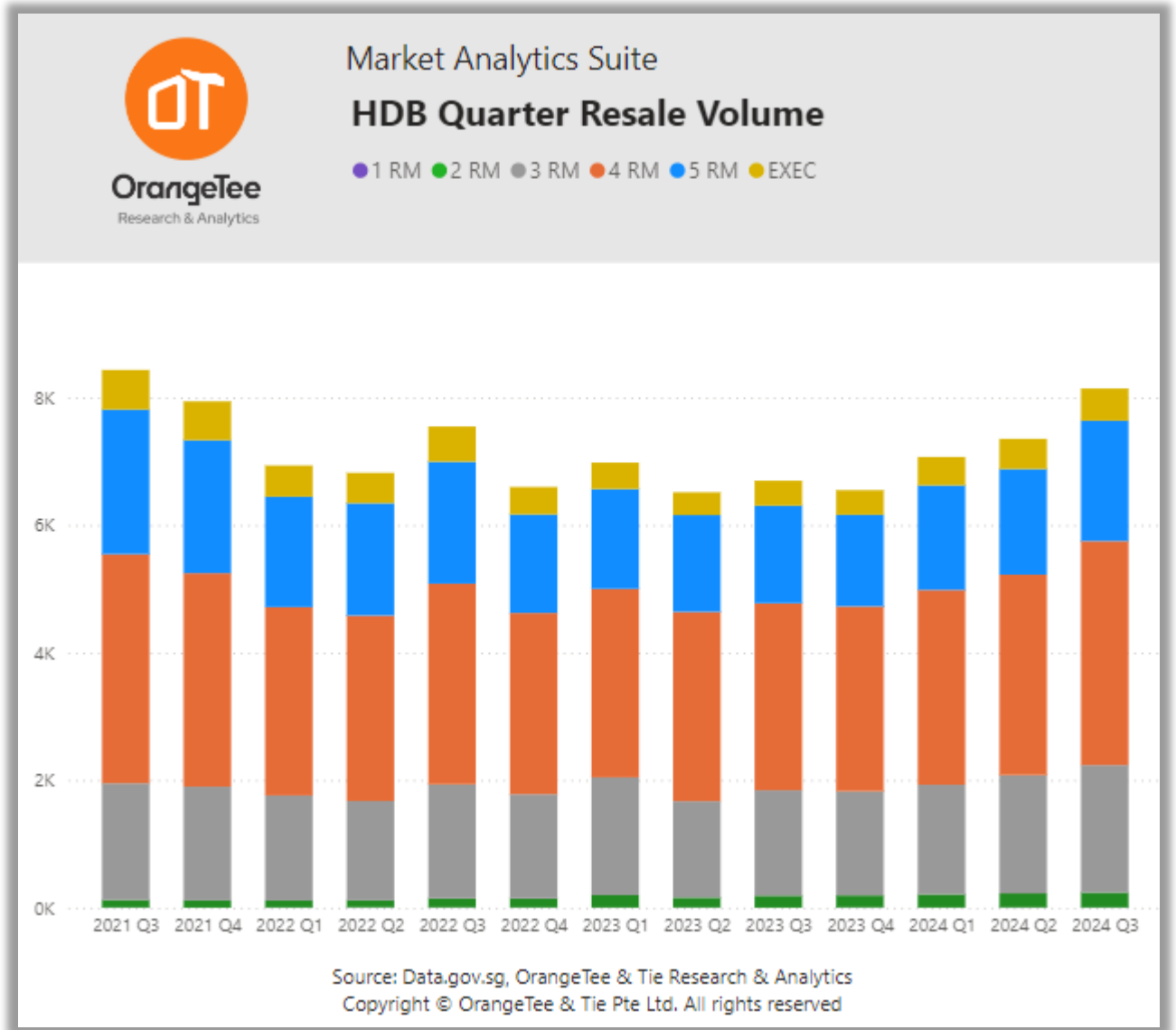
OrangeTee Market Projection

Private Residential

Private Residential Market Projection

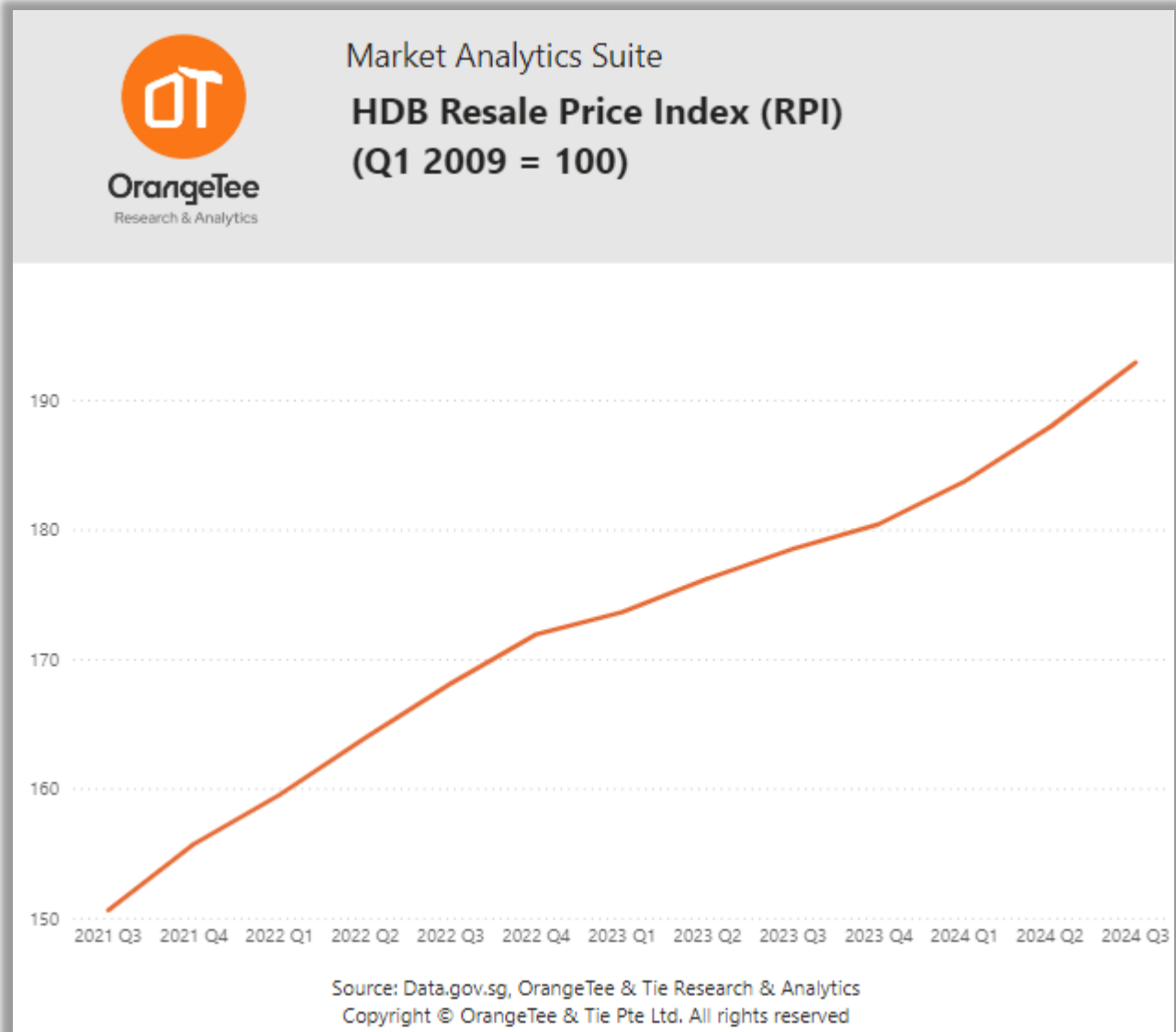
Indicators (All exclude EC except for URA PPI and URA RI)	2021	2022	2023	Q2 2024	Q3 2024	Q1-Q3 2024	Projection for 2024
Overall							
URA Property Price Index (Price Change) (incl. EC)	10.6%	8.6%	6.8%	0.9%	-0.7%	1.6%	2% to 2.5%
Sales Volume (units)	33,557	21,890	19,044	4,915	5,372	14,517	18,600 to 19,600
New Sale							
Average S\$PSF (Price Change) *	13.2%	12.5%	9.6%	2.7%	-3.5%	-6.9%	0% to 2%
Sales Volume (units)	13,027	7,099	6,421	725	1,160	3,049	4,500 to 4,800
Resale							
Average S\$PSF (Price Change)*	5.8%	8.7%	7.5%	1.0%	0.0%	2.6%	5.5% to 6.5%
Sales volume (units)	19,962	14,026	11,329	3,802	3,860	10,351	12,800 to 13,500
Rental							
URA Rental Index (Price Change) (incl. EC)	9.9%	29.7%	8.7%	-0.8%	0.8%	-1.9%	-3% to 1%
Leasing volume (units)	98,604	90,291	82,268	20,676	25,731	66,388	85,000 to 88,000

Source: URA, OrangeTee & Tie Research & Analytics * URA Realis caveat data data

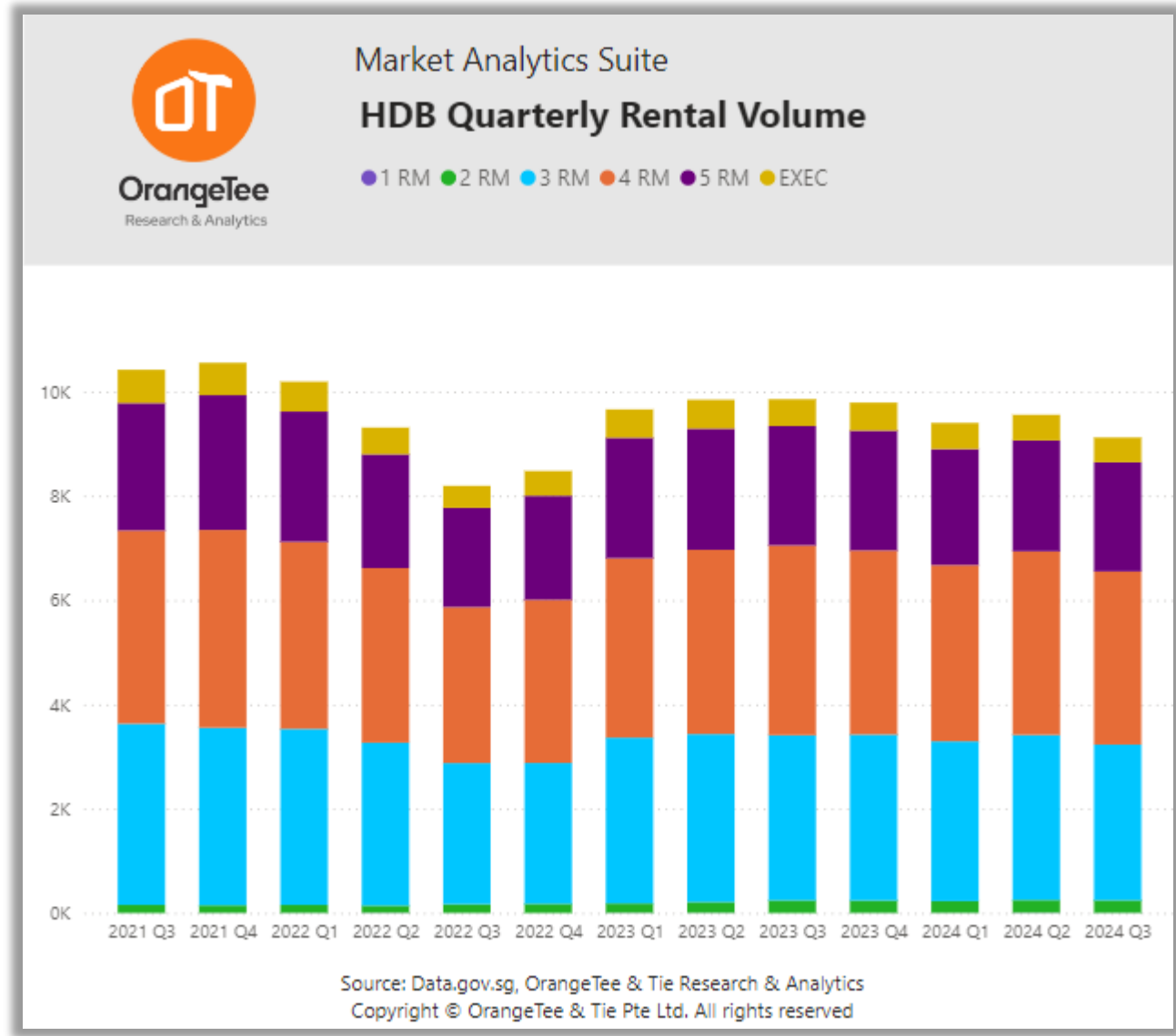


HDB Resale Volume

Resale volume rose by 10.7% q-o-q to 8,142 units in Q3 2024



The HDB Resale Price Index rose by 2.7% q-o-q and 8.1% y-o-y to a record high of 192.9



HDB Rental Volume

Rental applications fell by 4.6% q-o-q to 9,118 units in Q3 2024

OrangeTee Market Projection

HDB Resale

HDB Market Projection

Indicators	2021	2022	2023	Q2 2024	Q3 2024	Q1-Q3 2024	Projection for 2024
Resale							
Price Change	12.7%	10.4%	4.9%	2.3%	2.7%	6.9%	7.5% to 8.5%
Sales Volume (units)	31,017	27,896	26,735	7,352	8,142	22,562	28,500 to 30,000
Rental							
Rental Price Change (SRX-99.co)	7.0%	28.5%	10.1%	0.5%	1.0%	2.5%	2% to 3%
HDB Rental Applications	42,623	36,166	39,138	9,554	9,118	28,070	36,500 to 38,000

Source: HDB, data.gov.sg, SRX-99.co, OrangeTee & Tie Research & Analytics

Thank You

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